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Business Association and NGO Accreditation Criteria

Final Report June 2005

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Abstract

The Government of Jordan, under King Abdullah II, has adopted a socio-economic plan which espouses private-sector led economic development. The USAID-funded AMIR Program is helping to implement that plan. Part of AMIR's strategy is to strengthen business associations so these organizations can help carry out the goals of the national plan for economic development. This report includes a draft of the criteria in the form of questions to be incorporated in an Internet-based self-assessment with automated scoring and reporting systems for the accreditation of associations including nongovernmental organizations.

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Executive Summary

One of the major efforts of the USAID-funded AMIR Program is to assist in private sector development through activities of its Private Sector Policy Initiative and Enhanced Competitiveness Initiative. Based on extensive support offered to business associations and the establishment of a non-government organization promoting a culture of excellence those two initiatives are seeking a U.S.-based organization to form a strategic partnership with a Jordanian-based entity in implementing an accreditation program for business associations.

The purpose of this report is to show a draft of the types of questions, to be available on the Internet as a self-assessment, which will be asked of associations including non-governmental organizations. The scoring of these questions will be the basis for accrediting these organizations.

I. Introduction

As representatives of the private sector, Jordan's business associations and non-governmental organizations (NGOs) have emerged as important advocates for market-friendly reforms to accelerate private sector-led economic growth. At the same time, they have begun to deliver valuable business development services to their members, including management training and networking, further increasing their value to the Jordanian economy. During the last several years, the Enhanced Competitiveness Initiative (ECI) of the USAID-funded AMIR Program has offered extensive support to business association clients in these areas of business development services. Nonetheless, there is currently no means of verifying the competence these associations, let alone a measure for excellence. Accreditation by a nationally-recognized accrediting body would enhance the credibility and effectiveness of business associations among constituents, as well as other stakeholders such as government and international counterparts.

Any successful business association accreditation program requires a host that is widely recognized by and credible with the private sector. As the highest level of quality recognition in Jordan, the King Abdullah II Award is a choice as a host for such an accreditation function. Such an award might be a new, independent award or an extension of the King Abdullah II Award (KAA) for Excellence, which aims to enhance the competitiveness of Jordanian businesses by recognizing and publicizing quality and achievements. In addition, it has been proposed that the American Society of Associations Executives (ASAE) serve as a partner to the King Abdullah II Award for Distinction in Business Association Performance. ASAE is the highly-recognized body responsible for certifying association executives, as well as accrediting those companies that manage business associations in the United States.

Having such a U.S. partner will ensure that the standards set by the award are in line with best practices and continuously updated. It will also ensure that Jordanian business associations are on par with their international counterparts, thereby providing the highest level of service to their constituents, projecting a positive image for Jordan abroad, and otherwise making the best contribution to Jordanian society. It has also been proposed that a long-term, sustainable Memorandum of Understanding between the King Abdullah II Award for Distinction in Business Association Performance and ASAE secure continuous support from ASAE, including the training of auditors and the provision of information to guide the upkeep of assessment standards.

Given this background, the objective of this consultancy is to design and develop in coordination between the AMIR Program's Private Sector Policy Initiative (PSPI) and ECI the two sets of criteria for accrediting business associations and NGOs: the self-assessment that will be posted on the Internet and assessment criteria to be used by auditors representing the accreditation body. The report is organized as follows:

Part II provides an overview of quantitative and qualitative indicators; Parts III and IV provide details of those indicators, respectively. Annex 1 provides a vision statement for the accreditation program, followed by a Power Point presentation on the accreditation program for Jordanian business associations.

II. Overview of Quantitative and Qualitative Indicators

A. Quantitative Efficiency Indicators

Is the association doing things the right way?

Does the association have the needed information and processes in place?

- 1. The Association's Governance
- 2. The Association's Official Documents and Records
- 3. The Association's Vision, Mission and Strategic Objectives
- 4. The Association's Strategic Planning and Program of Work
- 5. The Association's Public Policy Issues
- 6. The Association's Staff, Human Relations Policies, Facilities management
- 7. The Association's Membership, Marketing, and Fundraising
- 8. The Association's Financial Management and Automation
- 9. The Association's Information and Communication Technology
- 10. The Association's Public Relations

B. Qualitative Effectiveness Indicators

Is the association doing the right things?
Is the association producing high quality and relevant results?

- 1. The Association's Leadership Capacity
- 2. The Association's National Perspective
- 3. The Association's Staff Professionalism and Morale
- 4. The Association's Knowledge Management
- 5. The Association's Information Dissemination
- 6. The Association's Public Image
- 7. The Association's Strategic Partnerships
- 8. The Association's Ethical Standards
- 9. The Association's Transparency
- 10. The Association's Meeting Management
- 11. The Association's Quality Management Procedures
- 12. The Association's Results

III. Quantitative Efficiency Indicators

A.

В.

	Does the association have a Board Executive Committee to make decisions between regularly scheduled board meetings?
	Does the association have a Board Personnel Committee to hire and evaluate the Chief Staff Officer?
	Does the association have a Board Audit Committee to work with the Financial Administrator and an outside auditing firm on an annual audit?
	Does the association have a Board Program of Work Committee to determine priorities for the work of the organization?
	Does the association have a designated Chief Public Spokesman to answer press inquiries and to announce important developments?
	Does the association have an organizational chart showing the relationships between the members, the board, the board committees, and the staff?
	Does the association have term limits for its chair and directors?
	Does the association have a strategy to promote new leaders into positions of responsibility?
	Does the association have written bylaws that comply with national legislation?
	• • • • • • • • • • • • • • • • • • • •
	Does the association have written bylaw updates? Does the association have a legal charter or some form of legal sanction from
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of authority for the Board and the staff?

C. The Association's Vision, Mission, and Strategic Objectives Does the association have a written vision statement that describes what the organization will become in five to ten years? □ Does the association have a written mission statement that briefly describes how the organization plans to achieve its vision? □ Does the association have a written strategic plan with strengths, weaknesses, opportunities, and threats of the association? □ Does the association have written strategic objectives that highlight the major areas in which the organization will work? Does the association have an industry or sector code of ethics for its members? D. The Association's Strategic Planning and Program of Work □ Does the association have a written program of work for the current year that details the work to be carried out to achieve each strategic objective? □ Does the association have program, project, and/or events committees to achieve the program of work? ☐ Has the association conducted a membership needs assessment? Does the association follow a strategic planning process that includes the following: 1. Planning to Plan; 2. National and Industry Goals; 3. Vision of Ideal Future; 4. Mission; 5. Objectives; 6. Model Operations; 7. Performance Review; 8. Gap Analysis; 9. Action Plans; and 10. Review and Update? Does the association have action plans for each program, project, event, and or service committee? Does the association have specific aims for each program, project, events, or service? Does the association have measurable programs, projects, events, or services? □ Does the association have achievable programs, projects, events, or services? □ Does the association have monetary and human resource allocations for each program, projects, event, or service? □ Does the association have timelines and assignments of responsibility established for each programs, projects, events, or service? Does the association have all programs, projects, events, or service within the boundaries of its mission statement and strategic objectives? □ Does the association have a standards program for members' industry? □ Does the association have technical programs for members and industry? □ Does the association have research and development programs for industry? E. The Association's Public Policy Issues □ Does the association have an agenda of public policy issues? □ Does the association have official board resolutions of adopted public policies? Does the association have issue briefs on public policy advocacy issues with a clear statement of the issue, opposing views, and a concise position statement of association?

		Does the association have research reports on public policy advocacy issues?
		Does the association have a public policy advocacy strategy action plan for each issue?
		Does the association have progress reports to the board on public policy advocacy issues?
		Does the association have education programs on public policy advocacy issues?
		Does the association have grassroots programs on major public policy advocacy issues?
		Does the association belong to public policy advocacy coalitions with other stakeholder groups?
		Does the association have a public relations program for public policy advocacy issues?
		Does the association have a method of tracking public policy advocacy issues through legislative and/or regulatory processes?
		Does the association have a public policy advocacy letters, phone calls, personal contacts, opinion articles, and other methods to influence decision makers?
F.	Th	e Association's Staff, Human Relations Policies, Facilities Management
		Does the association have written staff job descriptions?
		Does the association have a record on file of staff names, positions, and resumes?
		Does the association have a personnel procedures manual?
		Does the association have a performance evaluation form that is used for an annual evaluation of each staff member?
		Does the association have a standard job application form?
		Does the association have employee time sheets that allocate staff time to programs, events, projects, or services?
		Does the association have employee expense report forms that properly allocate expenses to specific activities?
		Does the association have employee orientation materials?
		Does the association have director orientation materials?
		Does the association have committee member orientation materials?
		Does the association have committee chairs orientation materials?
		Does the association calculate an employee turnover rate?
		Does the association have a staff training plan and programs?
		Does the association have available outside counsels (law and accounting)?
		Does the association have a ratio of annual budget total to personnel costs?
		Does the association record and charge personnel time costs to various projects or programs?

G.	The Association's Membership, Marketing, and Fundraising							
	□ Does the association have a planned program for asking for investments from potential members?							
	Does the association have a membership application?							
	☐ Does the association have a membership brochure with benefits of membership?							
	☐ Does the association have new member orientation materials?							
	☐ Does the association have committee preference cards that are sent out regularly and are included in all orientation materials?							
	☐ Does the association have membership certificates, decals, or plaques?							
	□ Does the association have a recognition program including award certificates?							
	☐ Does the association have a marketing plan for its programs, products, services, events, and publications?							
	Does the association have a fundraising plan to secure money above and							
	beyond its dues income?							
Н.	The Association's Financial Management and Automation							
	☐ Does the association have a current balance sheet?							
	☐ Does the association have a current income statement?							
	□ Does the association have a current cash flow statement?							
	□ Does the association have a current budget?							
	□ Does the association have financial reserves?							
	☐ Does the association have a percent of membership dues collected?							
	Does the association have a recent audit by an independent outside auditors?							
	☐ Does the association's financial structure rely heavily on a grant from one grantor?							
	□ Does the association have written limits of authority by Chief Staff Officer?							
	☐ Does the association have written financial policies?							
	□ Does the association have an automated accounting process?							
	☐ Does the association have an automated billing process?							
l.	The Association's Information and Communication Technology							
	☐ Does the association have up-to-date computer hardware and software for all staff members?							
	☐ Does the association have up-to-date software programs for financial management ¹ and association management ² ?							
	□ Does the association have Internet capability?							
	☐ Does the association have an interactive web site?							
	☐ Does the association have web site content production and management?							
	1							

¹ Financial Management: General Ledger, Accounts Payable, Accounts Receivable, Fund Accounting, Encumbrance, Purchasing, Sales Order Processing for Publications, etc, Grant Management, Payroll, Human Resources, Business Analytics, Budgeting ² Association Management: Advertising Management, Committee Management, Continuing Education, E-mail List Management, Customer Relations Management, Exhibit, Event, General Assembly, and Conference Management, Fundraising, Mailing List Management, Membership Management, On-Site Conference Management, Subscription Management

		Does the association have its membership records automated?
		Does the association have a membership communication program using latest
		IC technology?
		Does the association have interactive training programs?
		Does the association know the percentage of members on Internet?
		Does the association utilize outsourcing of key staff needs?
		Does the association belong to an ICT user group?
		Does the association have automated work flows?
		Does the association have online elections?
		Does the association have online membership directory?
		Does the association have online meeting registration?
		Does the association have online membership applications and approvals?
		Does the association have web casting/video conferencing capabilities?
		Does the association have broadcast fax/broadcast e-mail capabilities?
		Does the association have a regular computer backup system?
		Does the association have an automated asset inventory?
		Does the association have project and event management software?
J.	Th	e Association's Public Relations
	П	
		Does the association have a written core message telling how the association
		Does the association have a written core message telling how the association benefits its members and the nation?
		benefits its members and the nation? Does the association use this core message in all publications, news releases,
		benefits its members and the nation? Does the association use this core message in all publications, news releases, and other communication devices?
		benefits its members and the nation? Does the association use this core message in all publications, news releases, and other communication devices? Does the association have a regular printed and mailed newsletter?
		benefits its members and the nation? Does the association use this core message in all publications, news releases, and other communication devices? Does the association have a regular printed and mailed newsletter? Does the association publish a regular association magazine?
		benefits its members and the nation? Does the association use this core message in all publications, news releases, and other communication devices? Does the association have a regular printed and mailed newsletter?
		benefits its members and the nation? Does the association use this core message in all publications, news releases, and other communication devices? Does the association have a regular printed and mailed newsletter? Does the association publish a regular association magazine? Does the association publish as-needed action bulletins? Does the association have annual program brochures?
		benefits its members and the nation? Does the association use this core message in all publications, news releases, and other communication devices? Does the association have a regular printed and mailed newsletter? Does the association publish a regular association magazine? Does the association publish as-needed action bulletins? Does the association have annual program brochures? Does the association send out frequent news releases?
		benefits its members and the nation? Does the association use this core message in all publications, news releases, and other communication devices? Does the association have a regular printed and mailed newsletter? Does the association publish a regular association magazine? Does the association publish as-needed action bulletins? Does the association have annual program brochures? Does the association send out frequent news releases? Does the association have standard media kits?
		benefits its members and the nation? Does the association use this core message in all publications, news releases, and other communication devices? Does the association have a regular printed and mailed newsletter? Does the association publish a regular association magazine? Does the association publish as-needed action bulletins? Does the association have annual program brochures? Does the association send out frequent news releases?

IV. Qualitative Effectiveness Indicators

A.	Association's Leadership Capacity
	Are the leaders of the association considered industry leaders? Is the chair one of the industry's chief spokesman? Has the leadership of the association created a vision of the future that the members want to follow? Does the leadership have a mechanism for recognizing volunteers for their efforts?
В.	The Association's National Perspective
	Does the association appear to be contributing the national goals for development and progress? Do the leaders of the association work closely with the administration and legislative leaders to achieve mutually beneficial goals for the people?
C.	The Association's Staff Professionalism and Morale
	Is the Chief Staff Officer perceived to be a professional manager? Is the Chief Staff Officer an industry leader? Is the Chief Staff Officer a spokesperson for the industry?
D.	The Association's Information Dissemination
	Does the association tell its story often and properly? Does the association have a modern, well-designed logo? Does the association have a slogan that sums up the benefits of belonging? Are the association's views on public policies generally known to other leaders?
E.	The Association's Public Image
	Does the association have a good public image? Is the association perceived to be group of real leaders for the nation?
F.	The Association's Strategic Partnerships
	Has the association been a part of alliances with other groups to achieve specific goals? Has the association become a leader in forming such coalitions?
G.	The Association's Transparency
	Does the association appear to have transparent and open policies? Does the association appear to have open and transparent strategic goals? Does the association appear to have open and transparent programs?

I.

H. The Association's Meeting Management

Does the association have excellent meetings that are well-planned and well-promoted?
Do the association's meetings appear to accomplish their purposes?
Do meetings start and finish on set times?
Are programs or agendas printed for each meeting?
Are name badges provided for each meeting?
Are the principles and the preparation for good meetings carefully put into place for each meeting?
Are the meeting properly staffed?
The Association's Quality Management Procedures
Has the board of directors set quality objectives; i.e., satisfy the members with the association's programs, projects, events, publications, and services; continually improve the processes; detect nonconformance's with quality standards and take corrective action; improve corrective action response time; and insist upon a continuously learning staff and suppliers?
Does the association's board articulate a strategy for measuring and reporting on quality?
Does the association's Chief Staff Officer set quality measurement priorities?
Does the association have a quality manual?
Does the association have quality management forms?
Does the association have a set of quality standards and/or specification for various programs, projects, events, services, or publications?
Does all documentation carry footers with implementation date?
Does the Chief Staff Officer regularly review quality results?
Are improvements made on a routine basis through the use of the quality policy, quality objectives, audit results, analysis of data, corrective and preventive actions, and management reviews?
Does the association have special training in quality performance?
Does the association take member satisfaction surveys, interviews, or focus
groups?
Does the Chief Staff Officer regularly require internal quality audits?
Do the Chief Staff Officer and the board leadership insist on continuous quality improvements?
Does the staff take corrective and preventive action on identified quality problems?
Does the Chief Staff Officer have a document control procedure established for publications and important association documents?
What controls are in place to insure quality in project design and management?
Are quality principles included in written job descriptions and in job responsibilities?
Are there quality records required with specific staff jobs?

☐ Are records kept of quality checks; i.e. publication proofing?							g?			
J. The Association's Results										
	☐ Does the association produce activities or results?									
		re the	results r	eally impro	oving the r	nembers' bu	sinesses ar	nd the na	tion's e	conomy?
		Are	the	results	really	helping	create	jobs	for	people?

Annex 1 Vision Statement: Business Association Accreditation Program

DRAFT 3.0 FOR DISCUSSION PURPOSES ONLY

June 30, 2005

AMIR/Jordanian

Association Accreditation Program

Vision Statement

Over the past several years, the USAID-funded AMIR Program³ development assistance activities helped business associations' work toward achieving international best practice standards. To sustain those efforts as part of AMIR's exit strategy, an association accreditation program is to be established for a Jordanian-based group in cooperation with an internationally recognized leader in the field of association management. Therefore, by January 2006, the Enhanced Competitiveness Initiative (ECI) of the AMIR Program will plan, create and have operational a combination of (1) the King Abdullah Association Awards assessments, (2) the American Society of Association Executives' endorsement of the Jordanian accreditation program, and (3) an interactive and automated Internet Web site for verifying the competencies of Jordanian associations. By utilizing accreditation measurements in organizational governance, management, and operations, this program will enhance the effectiveness for Jordanian associations among their members and other Jordanian, Middle Eastern, and American stakeholders.

ECI's expectations of consultant's efforts:

- 1. Initiation of the acceptance by KKA and Jordanian associations
- 2. Validation by ASAE or some US-based group
- 3. Web-based accreditation site
- 4. Minimum hands-on implementation required by AMIR and the Jordanian based group
- 5. Completion prior to November 2005
- 6. First Round of Accreditations
- 7. Total project completed by January 2006

³ The AMIR Program is an innovative economic opportunity project funded by the United States Agency for International Development (USAID) and implemented in partnership with the Jordanian private sector and government.

Annex 2 Web Site: Business Association Accreditation Program

1. Jordan Association Accreditation Web Site

2. Page 1 Introduction

- 2.I. Banner
- 2.II. Brief Program Explanation
- 2.III. Benefits of Accreditation to Associations
- 2.IV. Sponsor Logos
- 2.V.Link:
- 2.VI. How to apply
 - 2.VI.1. Eligibility
- 2.VII. Who We Are
 - 2.VII.1. King Abdullah Awards
 - 2.VII.2. ASAE
 - 2.VII.3. Background
 - 2.VII.4. USAID
 - 2.VII.5. AMIR
 - 2.VII.6. Chemonics
- 2.VIII. Frequently Asked Questions
- 2.IX. Accreditation Process
 - 2.IX.1. What's Involved
- 2.X.Costs of Accreditation
 - 2.X.1. Link to Payment Pages
- 2.XI. Confidentiality

3. Page 2 Registration Form

- 3.I. Explanation
- 3.II. Link To Database
- 3.III. Link to User Profile

4. Page 3 Highlights of Accreditation

- 4.I. Quantitative Criteria
- 4.II. Quantitative Criteria
- 4.III. Auditing by KAA
- 4.IV. Awarding of Accreditation
- 4.V.Certificate w/ASAE's Seal
- 4.VI. Press Release
- 4.VII. Letter with Special Logo of Accreditation

5. Page 4 Association Profile and Account Information Form

- 5.I. People
- 5.II. Name
- 5.III. Headquarters Address
- 5.IV. E-mail Address
- 5.V.Phone
- 5.VI. Name of Chair of Board
 - 5.VI.1. Company
 - 5.VI.2. Address
 - 5.VI.3. Title

5.VII. Name of Chief Staff Officer

5.VII.1. Staff Names

5.VIII. Names of Directors

5.IX. Organization

5.X. Budget Details

5.XI. Programs

5.XII. E-mail account information for verification

6. Page 5 Payment Processing/Verification

7. Page 6-8 Self-Scoring Questionnaire

- 7.I. Scoring Explanation
- 7.II. Quantity Indicators
- 7.III. Quality Indicators

8. Page 9 Questionnaire Scoring/Notification of Score

- 8.I. Pass Link to Reference Request
- 9. Pass send the applicant an e-mail of the score and what they need to do next. Also send the score to the auditor.
 - 9.I. Fail Link to Resources
 - 9.II. References

10. Page 10 Request for References

- 10.I. E-mail to References
- 10.II. E-mail Received from References
 - 10.II.1.Link Reference Scores and addto Questionnaire Scores

11. Page 11 Request for Auditors

11.I. e-mail sent to auditors

12. Page 12 Score Verification by KAA Auditors via onsite visitations

- 12.I. Score Changers by Auditors
- 12.II. Link to Cumulative Scores Page

13. Page 13 Cumulative Score

- 13.I. Notification of Score and Announcement of Accreditation
- 13.II. E-mail to CSO
 - 13.II.1.Request of Board Meeting Date
- 13.III. E-mail to ASAE

14. Page 14 Generation of Certificate of Accreditation

- 14.I. Certificate Sent to KAA
- 14.II. KAA verifies Certificate Given of Association
- 14.III. Notification to KAA to Present Certificate at Chose Date of Board Meeting

15. Page 15 Awarding of Accreditation

15.I. Press Release Generated and sent to News Media

16. Administrative Tools

- 16.I. System Reports
- 16.II. Applicant Statistics
- 16.III. Process Duration Report
- 16.IV. Questionnaire Average Score Report
- 16.V. Study References
- 16.VI. Fee accounting and money distribution

Annex 3 PowerPoint Presentation: Business Association Accreditation Program



Accreditation Vision Statement

To sustain the AMIR Program efforts helping business associations in Jordan, an association accreditation program is to be established for a Jordanian-based group in cooperation with an internationally recognized leader in the field of association management

Strategic Objectives

- AMIR wants to plan, create, fund, and have operational a combination of:
- (1) the King Abdullah Association (KAA) Awards assessments, administrate, and management,
- (2) the American Society of Association Executives' (ASAE) endorsement of the Jordanian accreditation program, and
- (3) an interactive and automated Internet Web site for verifying the competencies of Jordanian associations.

Plan of Action

- Invite KAA to be Jordanian host for the association accreditation program
- Invite ASAE to be professional endorsing body
- Create an automated Web-based accreditation site with minimum hands-on implementation
- Complete first round of accreditations by November 2005
- Have operational by January 2006

Benefits to Jordanian Associations

- Currently there is no means of verifying the competence of business associations in Jordan, let alone a measure for excellence
- Accreditation by an internationally-recognized accrediting body would enhance the credibility and effectiveness of business associations among constituents, as well as other stakeholders such as government and international counterparts

Benefits to King Abdullah Awards

- Help improve the Jordanian economy through more effective business associations
- Help solve Jordanian social problems through more effective NGOs
- Help Jordan become a major player in the global economy
- Continue to expand the already successful KAA program

KAA's Major Contributions

- Provide national perspective to program
- Provide auditors to ensure compliance with accreditation criteria
- Adds a degree of national and regional credibility
- Adds value to the accreditation process

Benefits to ASAE

- Help Middle East Peace Process
- Create a pilot program for future implementation in other countries
- Costs are covered by USAID
- No management burden
- Potential world wide exposure of ASAE
- Potential money maker by creating total new market for ASAE publications

ASAE Major Contributions

- Provide international credibility to the program
- Provide improved opportunities for Jordanian and international association management profession
- Provide cutting edge knowledge transfer

Accreditation Program's Features

- Internet-based, self-assessment Web site with automated scoring and reporting systems for the accreditation of associations including NGOs
- No staff time required from ASAE once operational
- No funding required from ASAE or KAA
- Assessors supplied by KAA
- Initial funding supplied by USAID

Accreditation Measurements

- <u>Is the association doing things the right</u> <u>way?</u>
- <u>Does the association have the needed</u> <u>information and processes in place?</u>

Quantitative Effectiveness Indicators

- Governance
- Official Documents and Records
- Vision, Mission and Strategic Objectives
- Strategic Planning and Program of Work
- Public Policy Issues
- Staff, Human Relations Policies, Facilities management
- Membership, Marketing, and Fundraising
- Financial Management and Automation
- Information and Communication Technology
- Public Relations

Accreditation Measurements

- Is the association doing the right things?
- Is the association producing high quality and relevant results?

Qualitative Effectiveness Indicators

- Leadership Capacity
- National Perspective
- Staff Professionalism and Morale
- Knowledge Management
- Information Dissemination
- Public Image
- Strategic Partnerships
- Ethical Standards
- Transparency
- Meeting Management
- Quality Management Procedures
- Results

First Accreditation

- Planned for November of 2005
- Fully operational accreditation program by January 2005